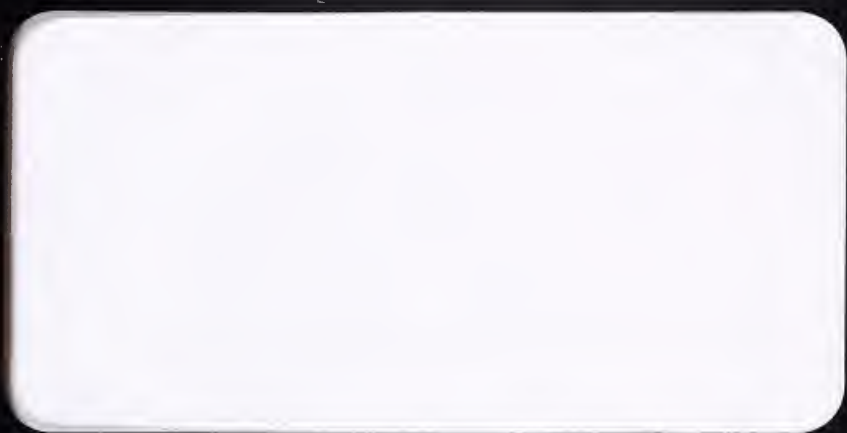


# Customer Services Directions

Client Meeting  
29 October 1993  
London

INPUT





# Customer Services Directions

Client Meeting  
29 October 1993  
London

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***Customer Services Directions***

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# **Customer Services Directions**

---

**Client Meeting  
29th October 1993  
London**

# Customer Services Directions

## Agenda

- Market signposts
- Environmental services
- Business services

CSP-PL- 2

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Notes

# Market Forecast Customer Services Market, 1993-1998

- Open versus closed
- Competition
- Service types

CSP-PL- 3

INPUT

Notes

# Customer Services United Kingdom

	£ Billion		CAGR (Percent)
	1993	1998	
Proprietary (Closed)	1.8	1.5	-4
Open (Potentially)	1.4	2.2	9

CSP-PL- 4

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## Notes



# Trends in Open Services

- Actual versus potential
- Project management
- Effects of networking
- Third-party software
- Towards the desktop

CSP-PL- 5

INPUT

Notes

# Customer Services United Kingdom

	£ Billion		CAGR (Percent)
	1993	1998	
Single-platform	2.2	1.7	-5
Multi-platform	1.0	2.0	15

CSP-PL- 6

INPUT

Notes

# Software Support Trends

- Integration with hardware
- Applications grow in importance
- Response centre versus outsourcing
- Tools

CSP-PL- 7

INPUT

Notes

# Customer Services United Kingdom

	£ Billion		CAGR (Percent)
	1993	1998	
System Vendors	1.8	2.0	3
Other Vendors	1.4	1.7	4

CSP-PL- 8

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## Notes

# Leading U.K. CS Vendors

Revenues	1992 (£ M)		Rank	
Vendor	CS	Other	1992	1991
ICL	381	185	1	3
Digital	278	137	2	2
IBM	265	183	3	1
HP	122	7	4	4
Unisys	98	18	5	5

CSP-PL- 9

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## Notes



# Leading U.K. CS Vendors

Revenues Vendor	1992 (£ M)		Rank	
	CS	Other	1992	1991
Granada	93	19	6	7
Bull	82	19	7	10
AT&T/NCR	67	40	8	8
Olivetti	53	8	9	9
Prime (CV)	46	21	10	6

CSP-PL- 10

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Notes

# Types of Competition

- IMO's "time warp"
- Channels —————> Partners
- Independents on parallel course
- Building services

CSP-PL- 11

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Notes

# Customer Services United Kingdom

	£ Billion		CAGR (Percent)
	1993	1998	
Support Services - Operational	2.0	2.2	1.9
Implementation Services - Project based	1.2	1.5	5.5

CSP-PL- 12

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## Notes

# Trends in Service Cultures

- Life cycle marketing needs project managers
- Reskilling selves and customers
- Support/Training synergy
- Projects —————> Contracts

CSP-PL- 13

INPUT

Notes

# Customer Services United Kingdom

Platform	£ Billion		CAGR (Percent)
	1993	1998	
Networks	0.6	0.8	4
PCs	0.9	1.2	6
Workstations/ Servers	0.7	1.1	9
Proprietary Hosts	0.9	0.6	-7
Desktop Services	0.2	0.4	22

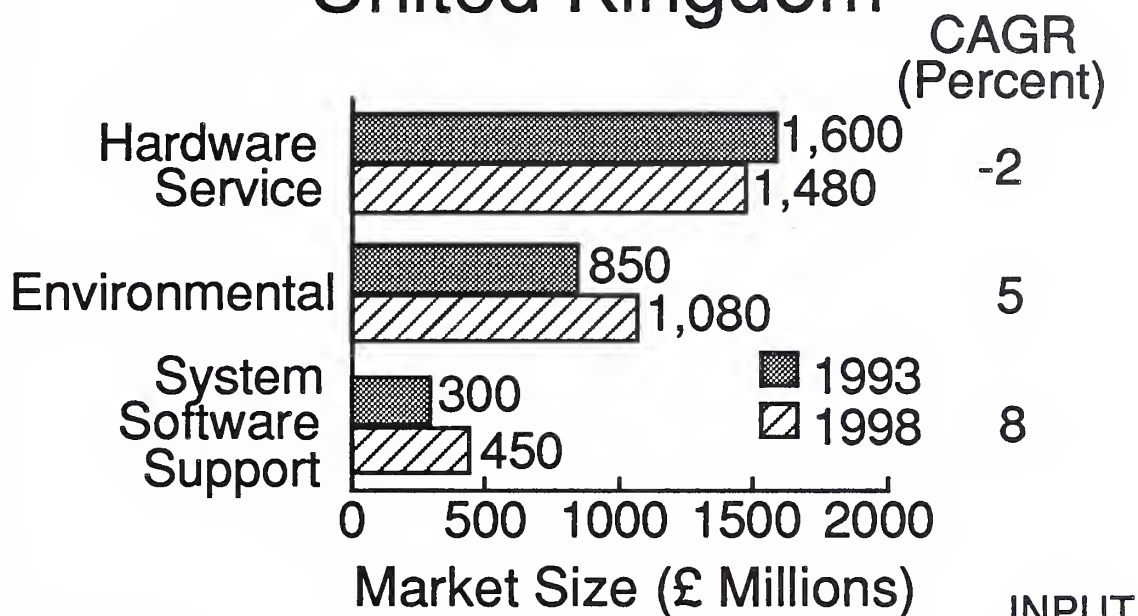
CSP-PL- 14

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Notes



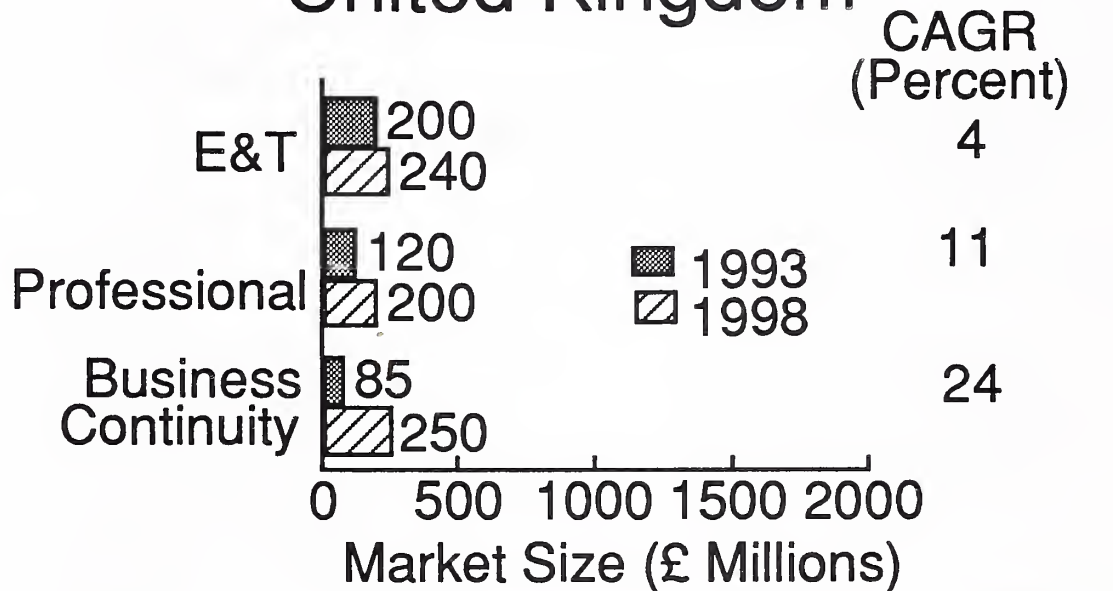
# CS Sector Growth United Kingdom



CSP-PL- 15a

## Notes

# CS Sector Growth United Kingdom



CSP-PL- 15b

INPUT

## Notes

# Environmental Services

---

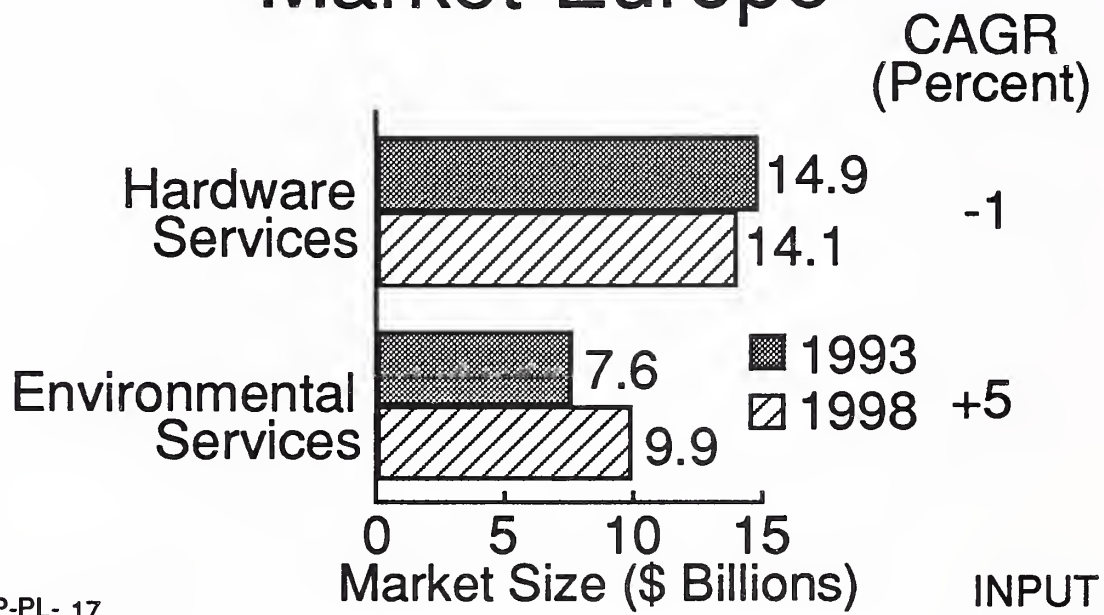
## From Cabling to Premises Management

CSP-PL- 16

INPUT

Notes

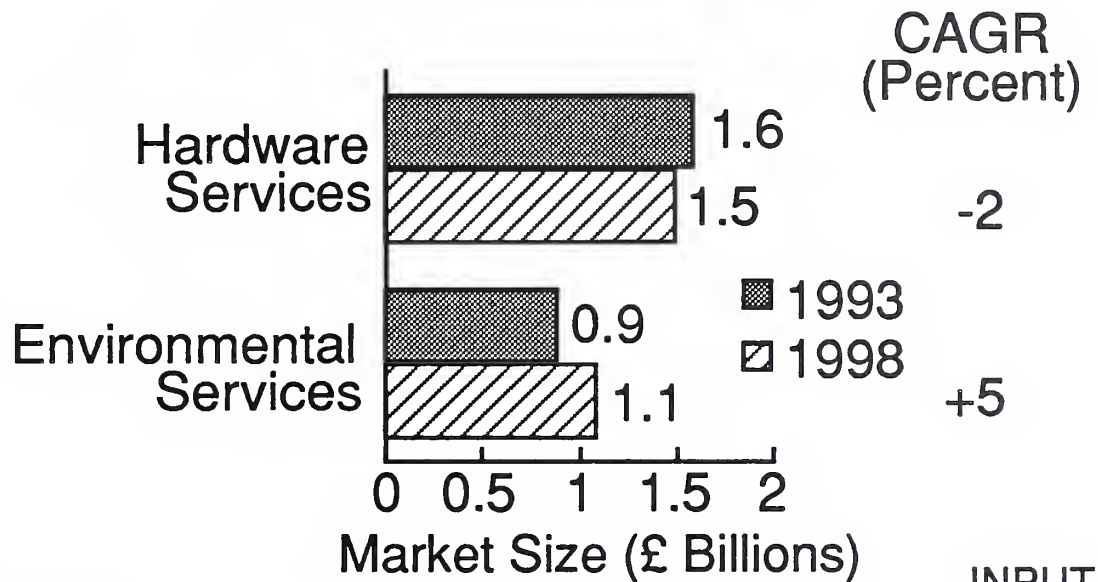
# Customer Services Market-Europe



CSP-PL- 17

## Notes

# Customer Services Market—U.K.

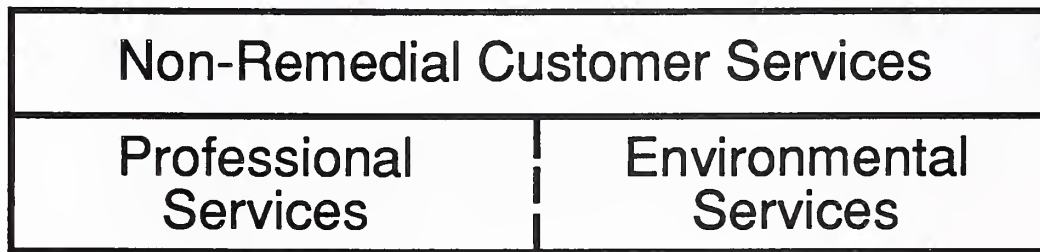


CSP-PL- 18

## Notes



# Market Segmentation



- Consultancy
- Design
- Project mgmt.



- Computer room
- Cabling
- Power/Light/etc.
- Installations

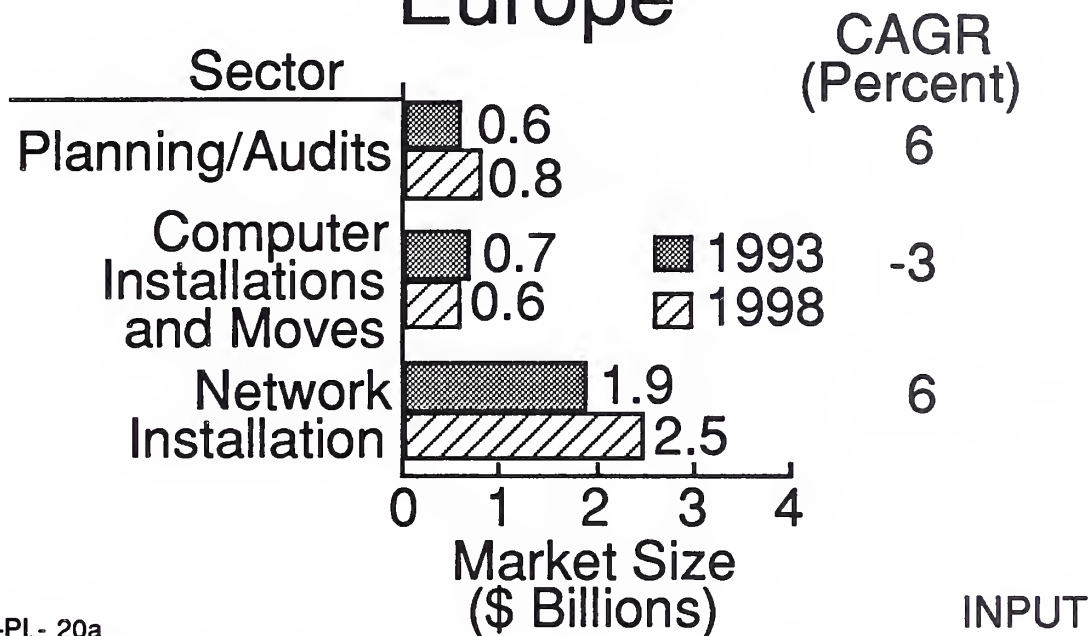
CSP-PL- 19

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## Notes

- Environmental planning and audits
- Computer installations/de-installations/moves
- Network installations and upgrades
- Cabling services for voice, data and power
- Building integration services

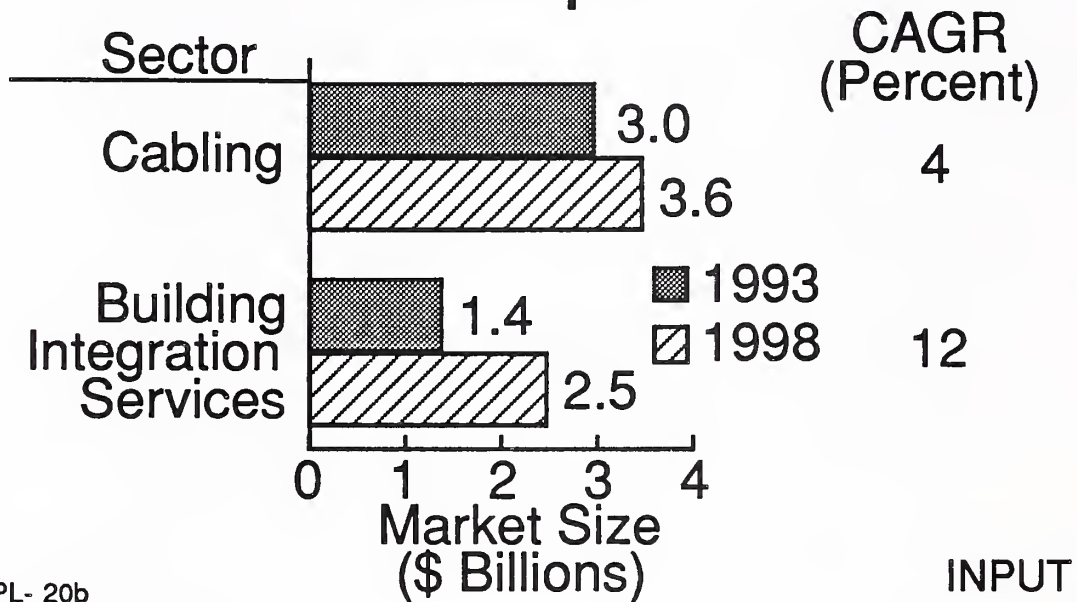
# Environmental Services Europe



CSP-PL- 20a

## Notes

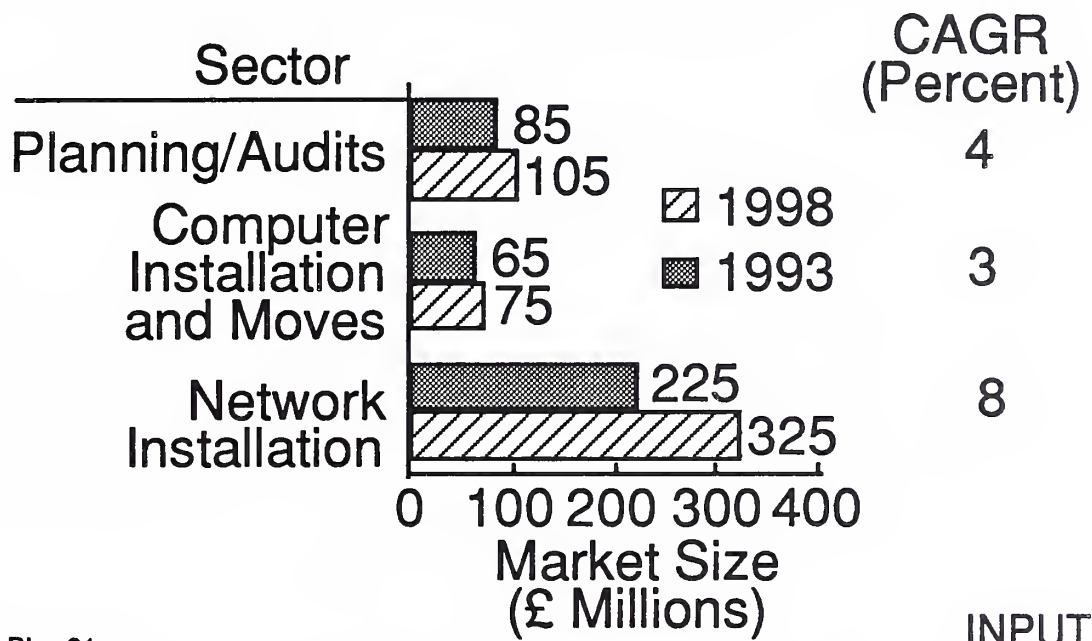
# Environmental Services Europe



CSP-PL- 20b

## Notes

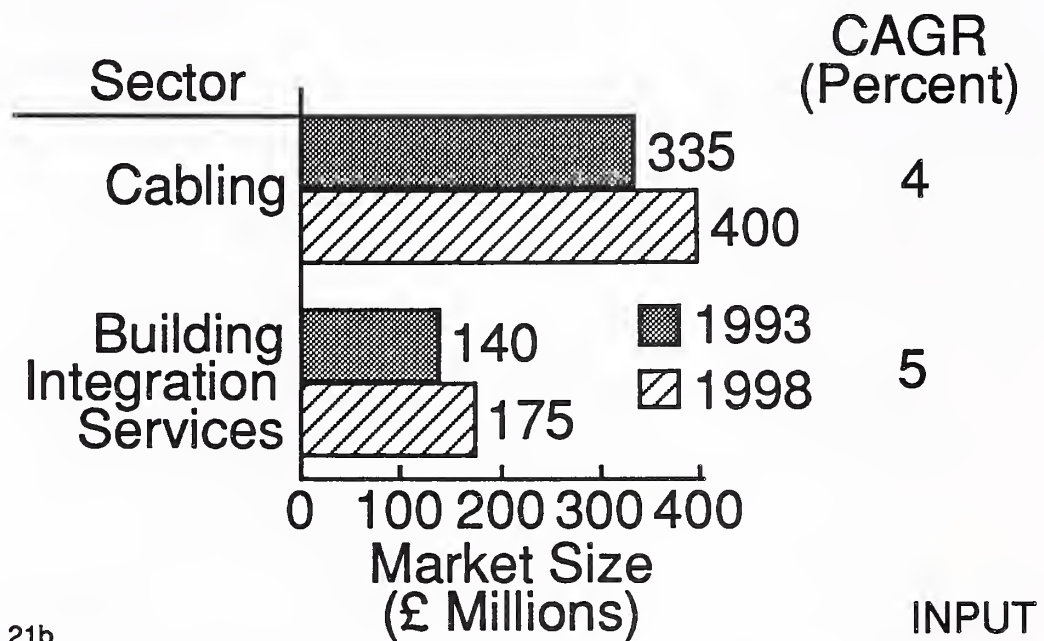
# Environmental Services—U.K.



CSP-PL- 21a

## Notes

# Environmental Services—U.K.



CSP-PL- 21b

## Notes



# Environmental Services Competition

## New Entrants

- Telecommunication vendors

## Suppliers

- Electrical contractors
- HVAC engineers

## Industry Competitors

- Building & construction firms

## Substitutes

## Buyers

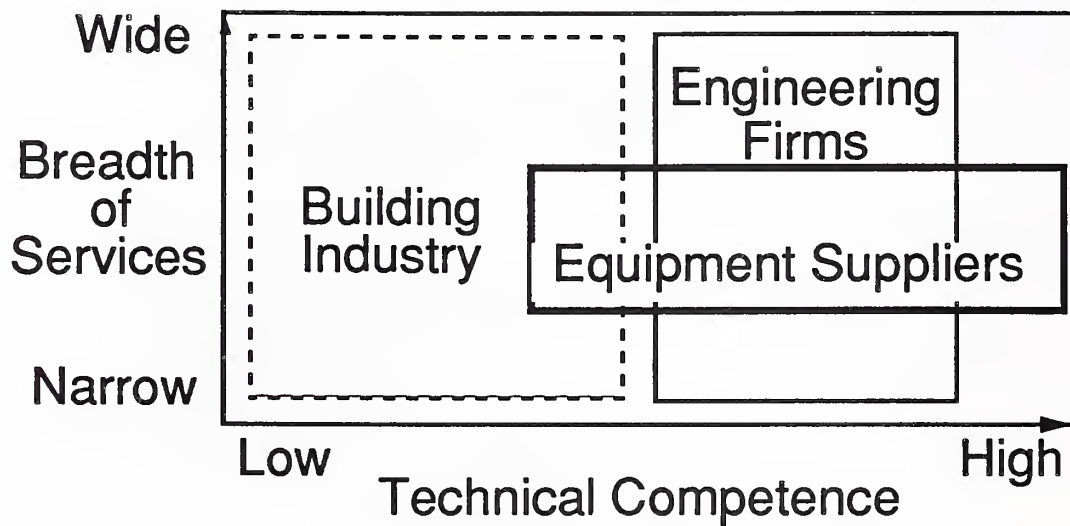
- Property services
- Outsourcing vendors

CSP-PL- 22

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Notes

# Vendor Positioning



CSP-PL- 23

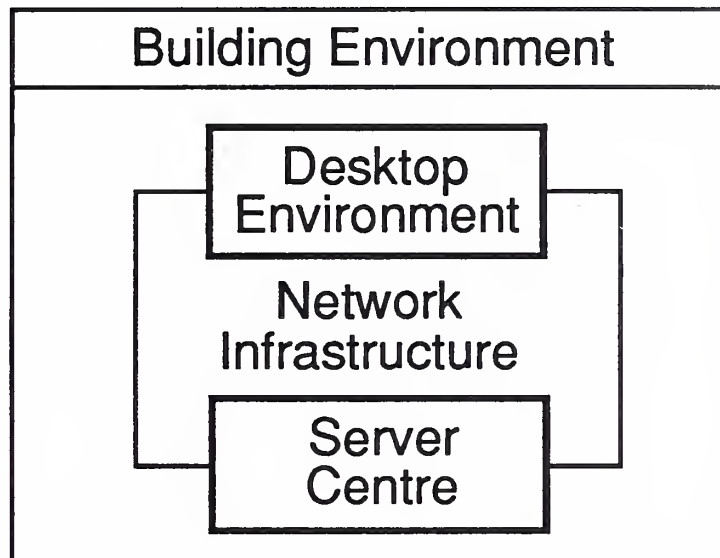
INPUT

## Notes

### Leading European Vendors

Vendor	Estimated Sector Revenues (\$M)	Market Share (Percent)
IBM	320	4.4
Digital	225	3.1
Unisys	130	1.8
Bull	105	1.5
SNI	95	1.3
ICL	75	1.0
Honeywell	65	0.9
HP	60	0.8
Olivetti	50	0.7
Getronics	40	0.6

# Facilities Services

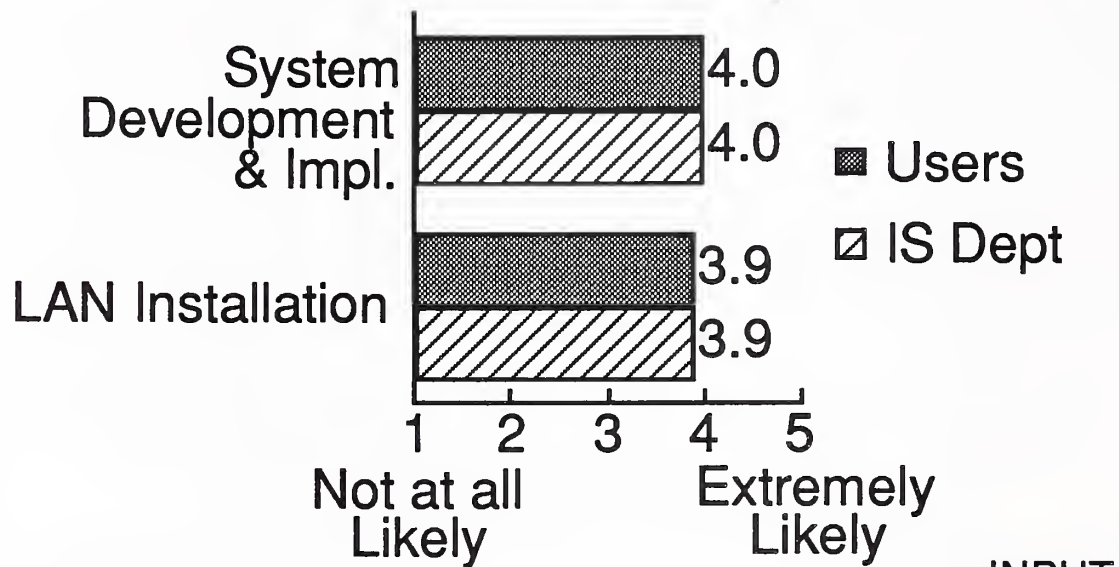


CSP-PL- 24

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Notes

# Principal Services Required Customer Perception

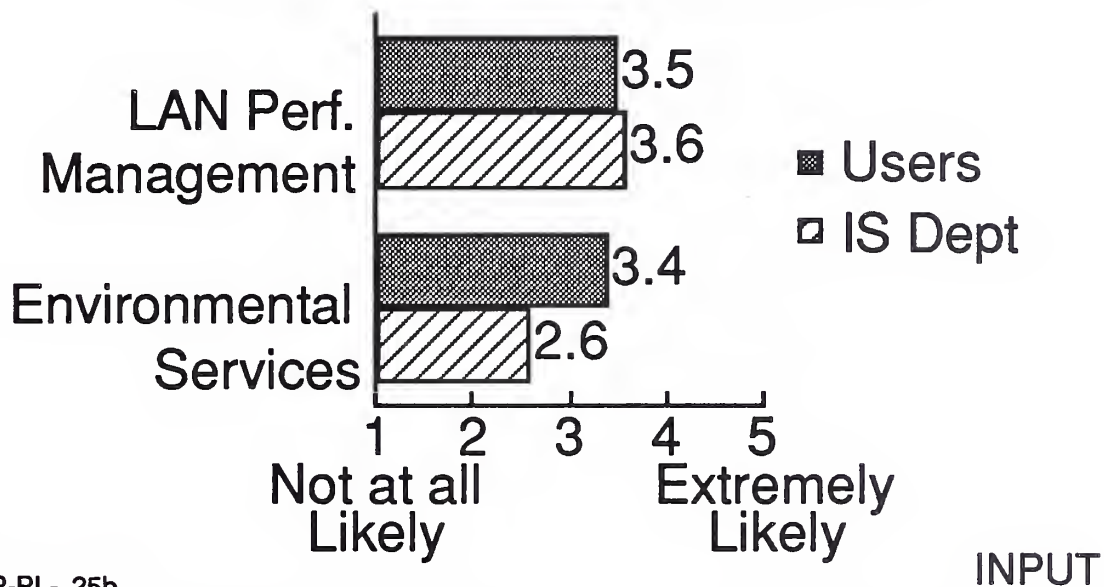


CSP-PL- 25a

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Notes

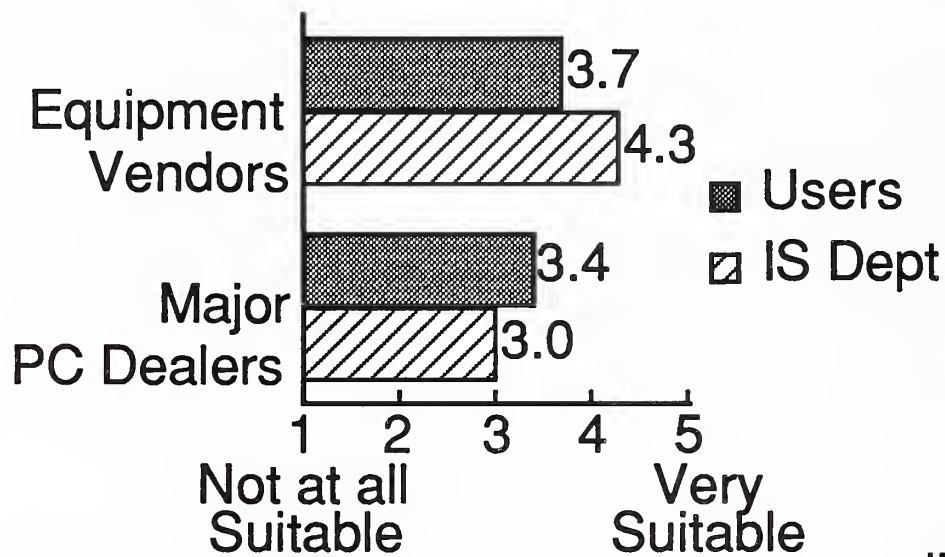
# Principal Services Required Customer Perception



CSP-PL- 25b

## Notes

# Vendor Suitability Customer Perception



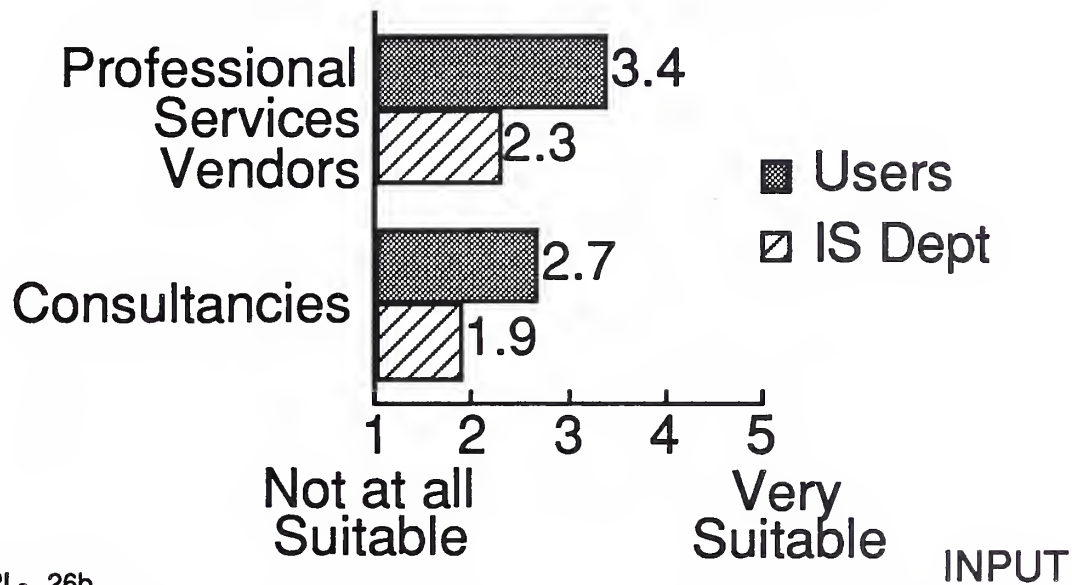
CSP-PL- 26a

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Notes



# Vendor Suitability Customer Perception



CSP-PL- 26b

Notes

# Business Services

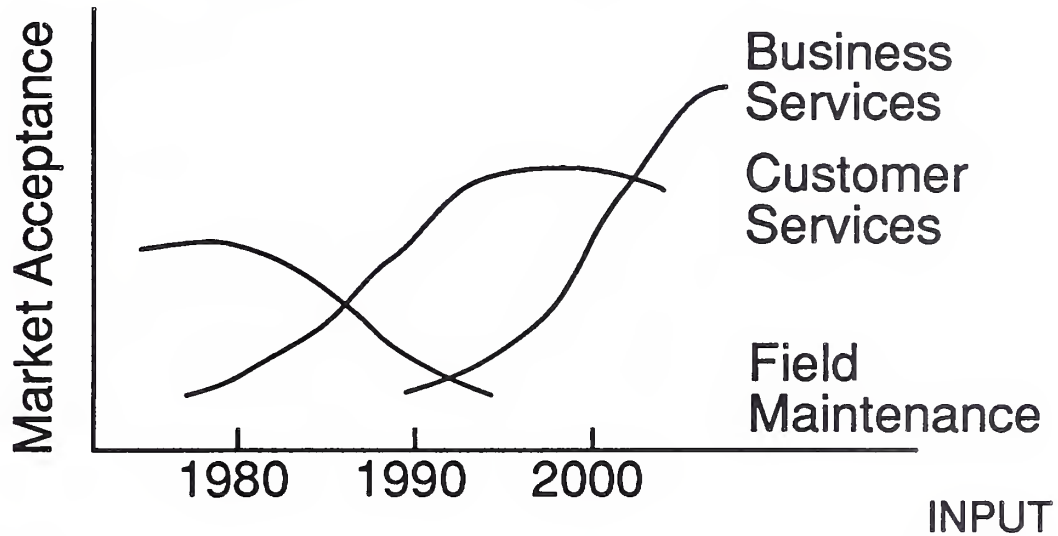
## A New Direction for Customer Services

INPUT

CSP-PL-27

Notes

# Customer Services Market Waves



CSP-PL-28

Notes

# Defining the Business Services Opportunity

Projects	SI	BIS	
Operations	Systems Operations	Business Operations	
	IT	Non-IT	INPUT

CSP-PL-29

Notes

# New Competitors

- BET FM
- Select FM
- P&O Total FM (Granada)
- Serco

INPUT

CSP-PL- 30

## Notes

### Other Competitive Firms

- Symonds FM
- Drake & Scull Technical Services
- MJN FM (Staveley Industries)
- Facilities & Property Management PLC
- IFM Co
- Procord (IBM buy out)
- Haden FM LTD.
- Airwork
- Thorn
- Hunting Engineering
- DASA
- Ciset
- Thomson

# Serco

- Offering a comprehensive range of services within one contract
- IAL acquired April 1992
- £150 million annual revenue (1992)
- 6,000 plus staff

INPUT

CSP-PL-31

Notes



# Serco

- Facilities management (51%)
- Operation and maintenance (20%)
- System engineering (18%)
- Project management support (11%)

INPUT

CSP-PL-32

Notes

# Business Services Positioning

Projects

Operations


Lo-Tech

High-Tech

INPUT

CSP-PL-33

Notes

# Conclusions

- Strategic issue
  - Product support service or system support service
- Environmental services a step towards business services

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CSP-PL- 34

## Notes



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## **SERVICE FEATURES**

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(Over 100 in-depth reports a year)  
Frequent bulletins on events, issues, etc.  
5-year market forecasts  
Competitive analysis  
Access to experienced consultants  
Immediate answers to questions

## **DATABASES**

- **Software and Services Market Forecasts**
- **Software and Services Vendors**
- **U.S. Federal Government**
  - Procurement Plans (PAR)
  - Forecasts
  - Awards (FAIT)
- **Commercial Application LEADS**

## **CUSTOM PROJECTS**

For Vendors—analyse:

- **Market strategies**
- **Product/service opportunities**
- **Customer satisfaction levels**
- **Competitive position**
- **Acquisition targets**

For Buyers—evaluate:

- **Specific vendors**
- **Outsourcing options**
- **Market opportunities**
- **Systems plans**
- **Peer position**

## **OTHER SERVICES**

Presentations to user groups, planning meetings, etc.

Acquisition/partnership searches

Newsletters

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